

## Transfer Account to First Equity

Complete this form to transfer assets into a First Equity Nominee account from another broker. Completed forms should be posted to: **First Equity Limited Salisbury House, London Wall, London EC2M 5QQ**

### Details of Account at First Equity - where stock is to be transferred.

First Equity Account No.

#### Account Holder

Title  First Name   
Surname   
Address   
Postcode  Date of Birth   
Email   
Mobile  Tel No.

#### Second Account Holder (for joint accounts)

Title  First Name   
Surname   
Address   
Postcode  Date of Birth   
Email   
Mobile  Tel No.

### Existing Broker Details - where stock is to be transferred from

You should consult your existing broker with regard to their terms and conditions of transfer

Reference / Account No.   
Broker Name  Contact Name   
Address   
Postcode   
Email  Tel No.

### Transfer Instructions

I hereby authorise you to transfer my investments to First Equity upon their written instructions to do so and provide such information regarding my above specified Account which they require.

**Please transfer my account in the form of** (please tick as applicable)

Stock & Cash ☐ Stock ☐ ISA (stock and cash) ☐

- a. This transfer form has been completed to the best of my/our knowledge.  
b. The transfer of holdings into First Equity does not constitute a change of beneficial ownership  
c. I have read and agree to be bound by First Equity Limited's Terms and Conditions and Services and Charges  
(as published on the website or available on request).

Signed   
Account holder  
Date

Signed   
Second account holder  
Date